



The Business Partner Network (BPN)

Federal Agency Registration

USER'S GUIDE

for Federal Registrants

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Federal Agency Registration

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USER'S GUIDE

Welcome!

Welcome to the Business Partner Network's Federal Agency Registration (FedReg) Guide. This Guide will show you how to register your agency, its bureaus, and their offices on FedReg, and walk you through some of the common processes on the system. It also includes background information on the system as well as a list of FAQ's and Help documentation. This guide and all of its appendices are also available on the website at www.bpn.gov (click on Federal Agency Registration). Questions about this guide and its contents can be directed to the BPN Help Desk (please visit www.bpn.gov for more information).

INTRODUCTION AND OVERVIEW

Background

President Bush's Management Agenda emphasizes e-government as a key foundation for providing quality government services to the public. One of the 24 elements outlined in this e-government solution is the Integrated Acquisition Environment (IAE). The three goals of the IAE are to:

- Create a simpler, common, integrated business process for buyers and sellers that promotes competition, transparency and integrity
- Increase data sharing to enable better business decisions in procurement, logistics, payment and performance assessment.
- Take a unified approach to obtaining modern tools to leverage investment costs for business related processes.

To those ends, the IAE has created the [Business Partner Network](#) (BPN). The BPN builds on the successes of major procurement support systems like Central Contractor Registration (CCR) and the SBA's ProNet to create a one-stop source for trading partner information. BPN will provide information on all trading partners, including commercial, government and grantees.

The Federal Agency Registration effort works within the BPN to expand the CCR to include federal agency buyers and sellers. Just like commercial trading partners register in the CCR to do business, so will federal traders, using a registration system tailored to their needs. This will increase federal sellers' visibility in the procurement arena and ensure that intragovernmental transactions are conducted with better information about both partners.

Having good records about federal trading partners is also the first step to solving another problem, eliminations. Accounting for intragovernmental transactions – fiduciary, exchange, and non-expenditure transfers – has been classified by GAO as a government-wide material weakness. This hinders true cost transparency and impedes achievement of

our goal of a clean opinion on the U.S. Consolidated Financial Statements. OMB has agreed that this weakness must be corrected and has made it a priority.

A major contributing factor to this problem is the current lack of standardization in processing and recording these transactions. As a step toward resolving this weakness, OMB and the IAE steering committee are establishing basic requirements for processing and recording intragovernmental transactions for all agencies. It is envisioned that these transactions will eventually be fed through a central portal system and tracked.

The Federal Agency Registration system (FedReg) will feed this portal system, attaching information about each trading partner to each transaction. FedReg, like CCR, will use DUNS numbers as unique identifiers for individual business locations for federal vendors and federal customers on this registration and on the eventual transactions.

This registration should be entity specific, not transaction specific. This means the registration should include standard information that does not change regardless of which transaction is being conducted (such as the address of the office). The portal will select the correct piece of information from the registration database when needed. This will increase information about trading partners and help with reconciliations.

Roles and Responsibilities

Registering every buying and selling office in the federal government is no small task! Fortunately, your agency will have several types of people to help. These roles are always filled by a government employee of the agency.

Agency Registration Officials

Each agency will have one Agency Registration Official, or ARO, and one alternate ARO. This person is responsible for managing the Business Partner Network (BPN) registration of agency buying and selling organizations engaged in intragovernmental transactions, and is always a government employee. AROs are registered with GSA, and receive their access directly from the system administrators.

The ARO has access to every bureau and office record within her agency. He/she may also provide access to other individuals in his/her agency to allow them to register their bureaus or offices directly. The ARO is responsible for ensuring that his/her agency meets the January 31, 2003 registration deadline.

Users

Everyone who has access to the site is a user. Other than the ARO, users will have been given access to one or several entities within an agency by the ARO. This person is responsible for registering or helping the ARO to register the entity to which they have been given access.

In the future, users will be able to search the entire site to find potential trading partners.

Points of Contact

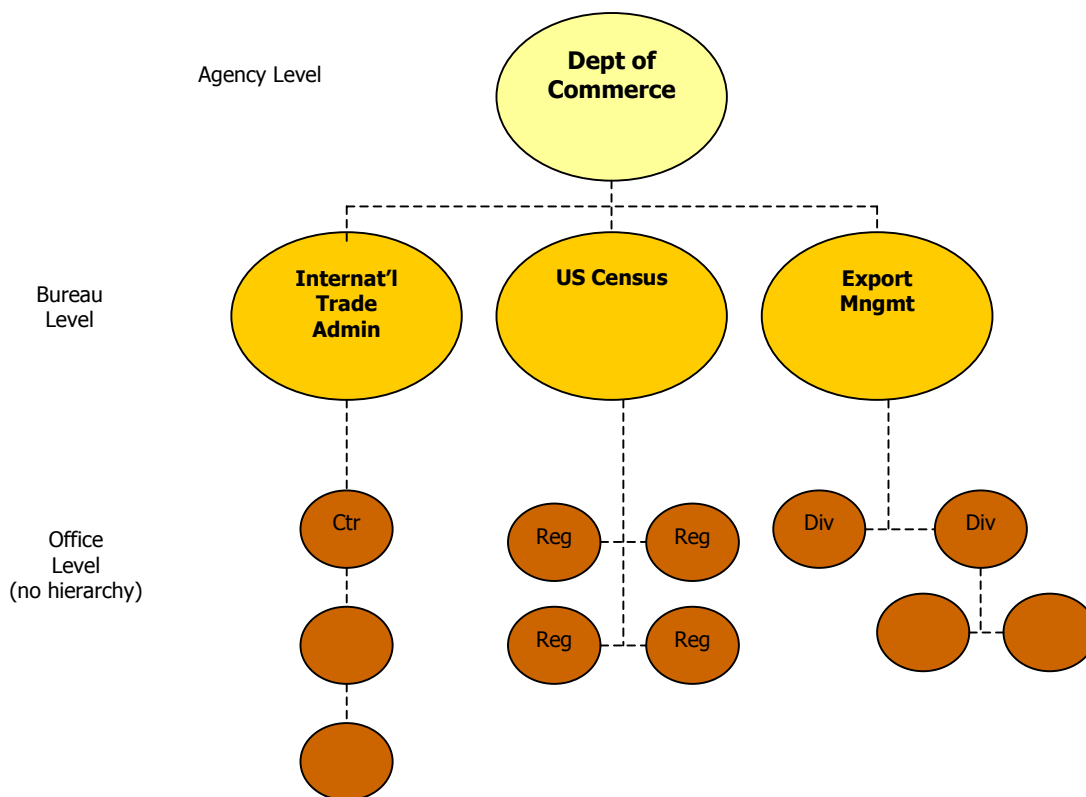
There are several points of contact needed in each record. These people may or may not be AROs or Users as well. POCs are given so that if another agency needs to contact this office about an intragovernmental transaction, they know who to call. Entering someone's information into a POC field does not give them access to the site. However, those with access to the site may be POCs.

General information about the site

The site is arranged in a three-tiered format. The tiers or levels, labeled Agency, Bureau, and Office, should correspond to the levels in your agency. The top level would be your Agency or Department (i.e. Department of Commerce), the second level would be your bureau or major component (i.e. Census Bureau), and the third level would be an office within a bureau. As there are only three levels in the registration system, subordinate offices would also be registered under the office category (level three) within a bureau (level two). Please see the diagram below for further clarification.

Keep in mind that the labels "Agency," "Bureau," and "Office" are just nomenclature to provide ease of use and standardization within the FedReg system. If your office uses other terms to refer to your second level and those entities below, you will just need to map them into the corresponding level. For example, GSA has "Services" which they will register at the Bureau level (i.e. Federal Supply Service), and "Regions" which they will register at the Office level.

Also, please note that although there is no hierarchy at the Office level, you may register as many "levels" down in your agency as needed to complete the requirement. The system will simply assign all of the offices to the Bureau and not track hierarchy. So you may have six more layers in your agency organizational chart under a bureau, but for the use of this system, they will all be registered as "Offices."



A common question is: **To what level should an agency register?** The answer is: It depends. At a minimum, agencies must have one agency record and a record for each bureau or major component in the system by January 31, 2003. Additional offices can be registered as well. There may be different levels depending on if the entity conducts intragovernmental **buying** or **selling**. Most agencies and offices within the federal government act as both at some point, thus most entities will choose Both Buyer and Seller. However, the level to which you register depends on your agency's business processes. Here are some guidelines to help you determine who should register.

Selling Entities

- Sells to other federal government agencies
- Receives and accepts orders
- Wishes to be visible in the government community as a seller
- Should register to the level associated with fulfillment and billing
- Will generally register to the office level

Buying Entities

- Buys from other federal government agencies
- Places the orders
- Has the authority to obligate funds for that purchase
- Should register at least to the bureau level

The goal is to identify the true trading partners to facilitate reconciliation, and to provide visibility to selling organizations through the Business Partner Network. You should discuss what level is right for your agency with your finance and procurement staff.

The DUNS Number

The Data Universal Numbering System (DUNS) number is the unique identifier for each record in FedReg and many other BPN systems. It is a unique 9-digit character assigned by the firm Dun and Bradstreet to each office within your agency. The number is used commercially to identify trading partners.

The DUNS numbers are location specific (meaning there is a new DUNS for each geographically distinct unit), and carry certain information with them, like office name and address. Since D&B has already created a unique numbering system for your office and has built a database of the associated information, we are saving effort and using the data they have already collected to serve as the “base” of your FedReg record.

So, the first step in registering your system is to obtain a copy of your DUNS “family tree.” This will show every DUNS that has been assigned to offices within your agency, and the relationships (hierarchies) that have been assigned to them.

You should review this information to ensure that it is correct and without omission. Please note **you will not necessarily need to register in FedReg every DUNS number that appears on your DUNS tree. This tree represents the universe of offices that you may register.** You should only delete a record from this DUNS tree if the office has closed or no longer exists. If you have new offices that are not represented on this tree, you may also get a new DUNS number.

To **modify or change** an existing DUNS record, call or email

- Dee Marie Davis at 610-882-7882, davisdee@dnb.com or
- Shannon Williams at 703-807-5077 williamss3@dnb.com

To obtain a **new** DUNS record, call 1-800-333-0505, choose option 3, then 2, then 1, then 1 for Federal Registration. Please do not try to register a new DUNS number at the D&B website - the online registration is only for commercial vendors.

There is no charge for this service.

REGISTRATION STEP BY STEP

Accessing the Site

To access the BPN Federal Agency Registration (FedReg) site, visit the BPN at www.bpn.gov, and click on the Federal Agency Registration link that is found on the left hand side. This will bring you to the homepage of the FedReg site, shown below.

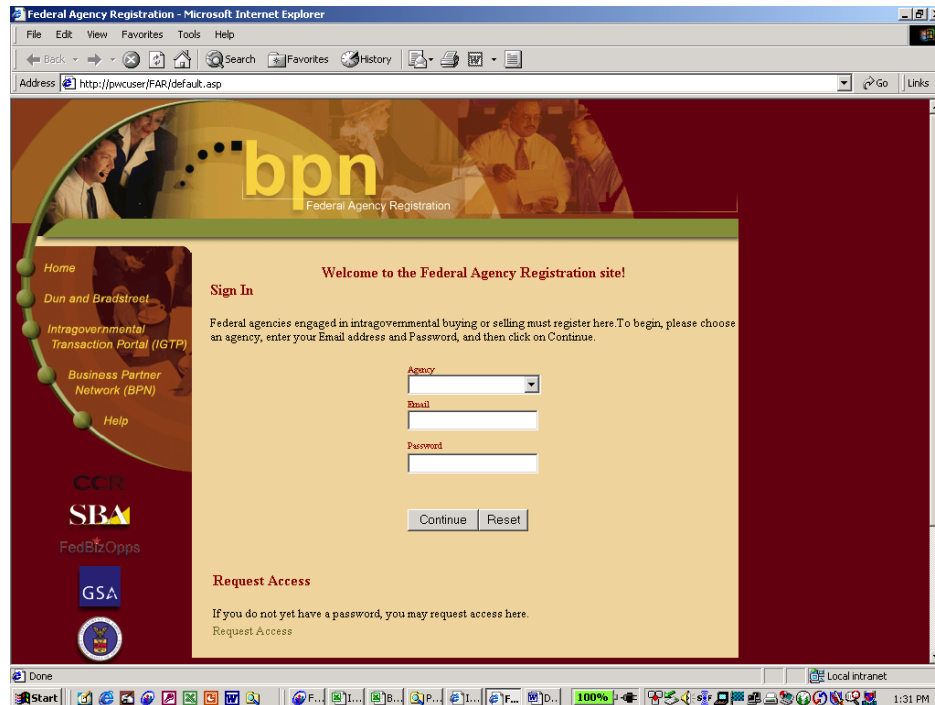


Figure 1 – FedReg Home page

Once on the homepage you may enter the site directly using your email and password, or request access. ARO's will get their passwords directly from the system administrators, while all other users will need to request access from their ARO.

Requesting Access

If you have not accessed the system before and you do not have a password, you will need to request access from your Agency Registering Official (ARO). To do this, click the “Request Access” link found at the bottom of the home page.

Welcome to the Federal Agency Registration site!

Sign In

Federal agencies engaged in intragovernmental buying or selling must register here. To begin, please choose an agency, enter your Email address and Password, and then click on Continue.

Agency

Email

Password

Request Access

If you do not yet have a password, you may request access here.

[Request Access](#)

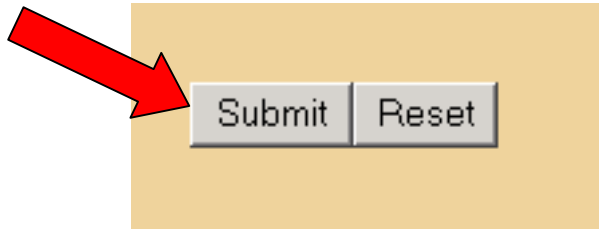
Figure 2 – Request Access link

This will take you to page where you must fill in some basic information about yourself and choose a password. **Please remember this password as you will need it to access the system!**

Password – Choose a password you will remember! Passwords must be “strong.” This means each password must:

- Be between 8 and 12 characters long
- Not be a word in the dictionary
- Include at least one digit (number) and one letter
- We ask you to type your password twice to confirm it.

All fields marked with an asterisk (*) are required. Once you have completed all the information you wish, click on the Submit button. It will look like this:



You will then be shown a confirmation page. The data you entered will be available to your ARO. He or she can then assign you access to an entire agency, a bureau, or an office thereof. Once you have been assigned access, you will receive an email informing you of your access level.

Entering the Site As a User

Once you have your password, you can enter the site.

- 1) On the home page, navigate to the drop down list labeled Agency. Click the down arrow and scroll down to locate your agency, then click on the appropriate Agency. Please note this should be the agency you work for, and for which you are registered in the system.
- 2) Enter your work email address in the next field.
- 3) Enter your password in the last field. Please note the password required is the one you chose when you requested access (AROs are excepted from this guideline as they will receive their passwords directly).
- 4) Once complete, click Continue to enter the system.

A screenshot of a login form on a light orange background. It contains three input fields: a dropdown menu labeled 'Agency', a text box labeled 'Email', and a text box labeled 'Password'. Below these fields are two buttons: 'Continue' and 'Reset'.

Figure 3 – Accessing the site

Record Access Page

The next screen you see will be your Record Access page. This shows you which sections of the site you have access to and will vary by user. It will list every agency and bureau for which you have access. Most people will have access to only one agency. Access also cascades, meaning that you have access to any entity subordinate to one for which you have access. For example, in the below figure, this user has access to the United States Marshal Service *and* any office within that bureau.

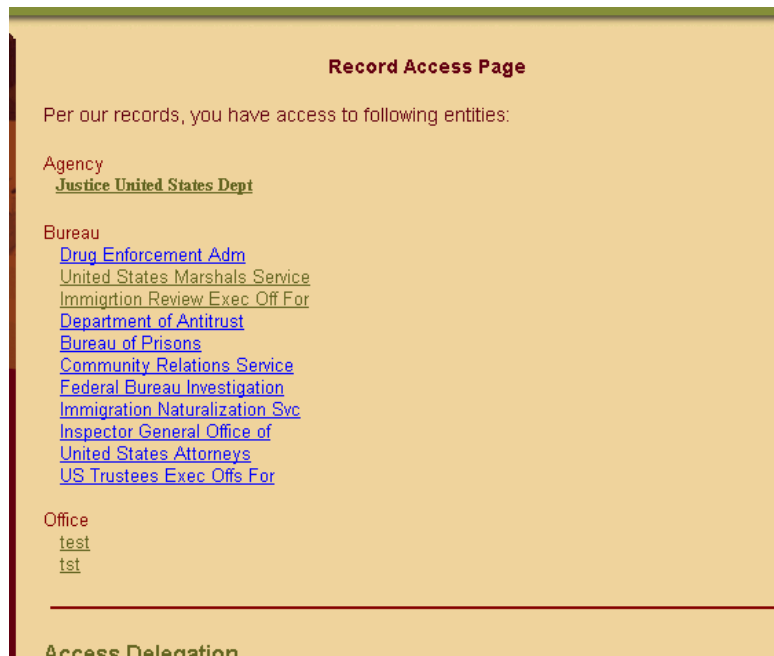


Figure 4 – Record Access Page

You should select the entity you wish to work on from this list. Each entity at each of the three levels (Agency, Bureau, and Office) will have its own complete record. You are now ready to choose an entity to register.

Data Entry

Each record, whether Agency, Bureau, or Office, has a similar layout. Here is an overview of the record's sections (we will repeat this overview in the left margin so you can track your progress):

Entity Information (Dun & Bradstreet) Data associated to this DUNS as supplied by the D&B database such as phone and address.	
General Information General information about this entity such as Employer Information number, ALC and	
Registration POC Eliminations POC	
Choose Business Type Buyer, Seller or Both	
Seller Information General seller information about products and volume of sales plus two more POCs: Accts Receivable POC Sales POC	Buyer Information Accts Payable POC

Figure 5 - Data Layout

We will go into more detail on each of these data elements in the next section. Data elements help can also be found in the Data Elements Dictionary found in the appendix and is available online.

Creating an Agency Record

Beginning at the Record Access page, choose the agency you wish to access. In most cases, AROs will only have access to one agency. Click on the agency name, and you will be taken to an “Entity Information” page with basic information about that agency.

If you do not see any agencies under the Agency list, you do not have access to the entire agency, only particular bureaus or offices. You may request access to an entire agency from your ARO. Or, just start from “Creating a Bureau Record”

Entity Information

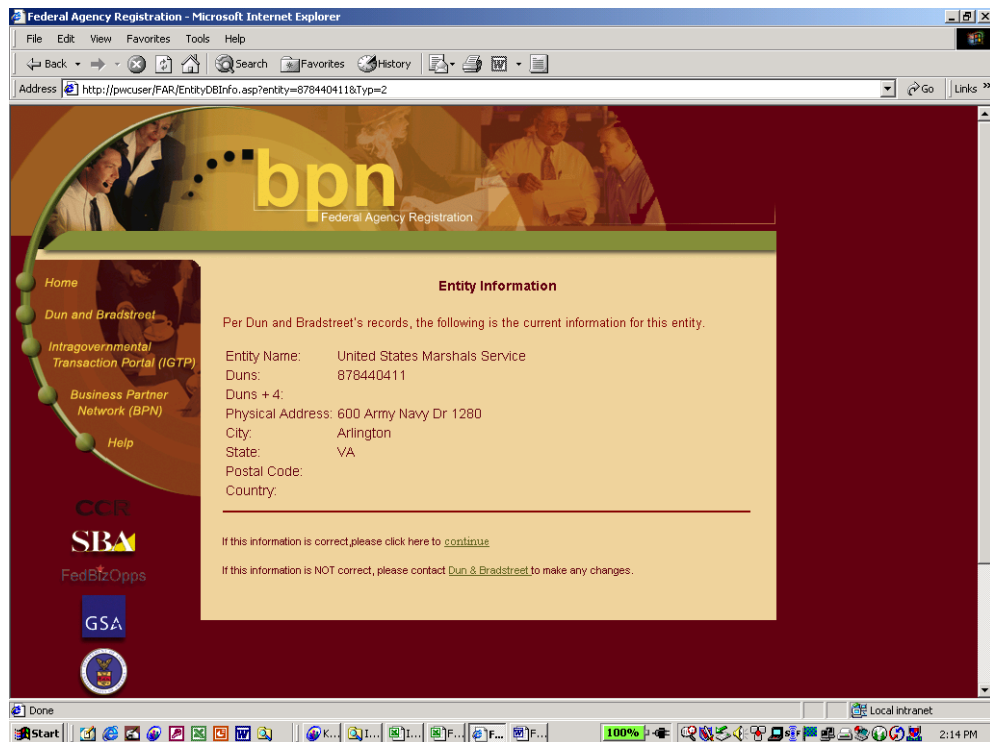


Figure 6 – Entity Information

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

The Entity Information page data is pre-filled for you from the Dun and Bradstreet database. Review this information. If it is incorrect, you will need to contact D&B to correct it. You can do this by calling Dun and Bradstreet (please refer to the DUNS section for more information on how to do this. If it correct, click Continue to go on.

General Information

Please provide the following information about your entity and then click Continue. Fields with an asterisk (*) are required.

*Employer Identification Number

Department Code

Agency Location Code
Please enter your agency location code or select from the list below

Disbursing Office
Please enter your disbursing office or select from the list below

Continue Reset

Callouts:

- EIN (points to *Employer Identification Number)
- Agency Location Code (points to Agency Location Code)
- Disbursing Office Symbol (points to Disbursing Office)
- Department Code (points to Department Code)

Figure 7 – General Information

The next section requests general information about your agency. Any fields with an asterisk (*) are required. You will see Help buttons next to each data element which will provide the following guidance:

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

EIN– Employer ID Number. This is a 9-digit number similar to a Taxpayer ID Number or Social Security Number. Your personnel office should have this information.

Department Code – This code identifies the agency. Categories correspond to the [Treasury Index of Agency Codes](#). In most cases, the Department Code will correspond to the agency for which the user works.

Agency Location Code (ALC) – A numeric symbol used to identify accounting reports and documents prepared by or for agency accounting stations and disbursing offices, e.g. eight-digit agency accounting station code, four digit disbursing office symbol, and three-digit Treasury disbursing center symbol. This 8-digit code corresponds to the registering office and is usually associated in a one-to-one relationship with the DUNS. You may need to search our database for a list of possible ALC's as they are listed in the Treasury IPAC system. You will receive a drop down list based on your agency, and you may choose one. You may also enter the ALC directly if you know it. If you do not know which code relates to this office, ask your finance office. If you have more than one

ALC for this office, you may need to create a DUNS + 4 extension (this should be a rare case. Please contact the Help Desk for assistance using this function).

Disbursing Office Symbol – This five-digit symbol is used by the Treasury Department’s IPAC system and various other legacy systems to identify further financial information about your organization. It is generally linked to a particular ALC. In that case, the Disbursing Office Symbol will be automatically filled in for you. If we do not have a DO that links to your ALC, you will need to fill it in individually.

For more information on these data elements you may contact the Help Desk (please click the Help button on the left of your screen).

Once you have filled in this general information, click Continue to move on to Point of Contact Information.

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

General Points of Contact (POCs)

The first Point of Contact to fill in is the **Registration POC**. This should be an actual person who may be contacted with questions regarding the information in this record. Please note that filling in a person’s POC information here does not give them access to the system, but it may be used by another agency when trying to resolve an intragovernmental transfer issue.

Registration POC using a previously listed person:

In many cases the appropriate person here will be you, the user! In other cases it will be someone who is already listed as a POC somewhere else in your agency. So to save you some time, we have created a way to fill in your data automatically. Click the arrow next to the drop down list at the top of the page to see if the individual you would like to use is listed here. If so, click their name to select, and then click Continue. You will be taken to a new page in which all of that user’s information is filled out. You should go through and review that information, completing any required fields. Then click continue to move on.

Figure 8 – Registering a POC with a previously listed person

Registration POC using a new person:

You may also fill in information for a POC who has not been previously registered. Just skip the drop down box and begin filling in that POC's information at the Email field. All fields with an asterisk (*) are required. You will fill in basic information about that person as follows:

POC Data

Email – Work email of the POC. This should be a unique and direct email.

Name – Name of the POC. First name and last name are required fields. Middle initial is optional.

Phone Number – 10 digits including area code and phone number, for example 2025551212. This should be a direct line to this individual.

Extension – If the phone number you give is not a direct line, please include the extension.

Fax – The number where you can receive faxes. 10 digits including area code and fax number.

*The information you enter
about points of contact in
your office may be used by
other government agencies to
environmental
It will not be
general
, you should
this*

Street Address 1 – Physical street address (not a PO Box) for your place of work

Street Address 2 – Additional address information such as Suite, Building, or PO Box numbers

City – City in which the place of work is located

Country – Country in which the place of work is located

State – US State in which the place of work is located. Only required if Country is USA.

Zip Code – Valid zip code. Please visit <http://www.usps.com/zip4/> for more information. Only required if Country is USA.

Zip + 4 – 4-digit zip code extension. Please visit <http://www.usps.com/zip4/> for more information.

Postal Code – This is only used if you choose a country other than USA.

Once you have completed all required fields, click Continue to go on.

The next POC to fill in is your **Eliminations POC**. This should be the person in your agency to contact regarding intragovernmental eliminations. Again, please enter an actual person here, using the same data elements as above. You may choose a previously designated individual here as well by selecting them from the drop down list. Once you have completed all required fields (and any others you wish to complete), click Continue to move on.

Business Type

The next screen will ask you what role your agency plays in intragovernmental transactions. You should choose one of the three options in the drop down box: Buyer, Seller, or Both Buyer and Seller. The next few sets of data you need to fill out depend on what you choose here.

Figure 9 – Business Type

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

Business Type – If your office buys from other federal government agencies, it is considered a Buyer here. This is the same thing as the customer in this transaction. A buyer is an entity that places an order with another agency and has the authority to obligate funds for that purchase. If your office sells to government agencies, it is considered a Seller here. A seller is considered any office that receives and accepts orders from another agency (not necessarily the office that actually fills the order). Anyone who wishes to be visible in the government community as a seller of goods and services should also register here as a Seller. If your office ever does both, you should choose “Both Buyer and Seller.”

Seller Information

If you chose Seller or Both Buyer and Seller on the last step, you will next see a set of general seller information. All fields with an asterisk (*) are required.

Figure 10 – Seller Information

Entity Info	
General I	
General P	
Business Type	
Seller Info	Buyer Info

Annual Revenue – Total revenue from intragovernmental sales for the previous fiscal year. This should be for the particular office related to this DUNS number, not for the agency as a whole. This information will be used for informational purposes only.

Credit Card – Indicate if your entity will accept government purchase card payments for intragovernmental sales. If yes, you must enter your Merchant ID.

Merchant ID Number 1 – Number assigned to you by the bank that processes your credit card receipts. Similar to a routing number.

Merchant ID Number 2 – If you work with two different banks to process credit card receipts you may have two merchant ID's. If so, enter the second bank's Merchant ID here.

Federal Supply Class – This is a four-digit code which describes the products or services your office sells. You may enter up to 20 codes in this field by placing a comma (,) but no spaces in between each code (for example 1234,3456,7865). For a listing of these codes, you may visit www.fpsc.gov.

NAICS – North American Industrial Classification System. This six-digit code replaces the formerly used SIC codes to indicate the products or services your office sells. For a listing of codes and more information on NAICS, you may visit the [Census Bureau NAICS site](#). You may enter up to 20 codes in this field by placing a comma (,) but no spaces in between each code (for example 123456,345678,786543).

You will also need to fill information for two more **POCs, Sales and Accounts Receivable**. Please refer to POC data above for details. The only difference is that for these two POCs, you are encouraged to general (office) name, email, and phone information (such as sales@myagency.gov).

Buyer information

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buy Info

If you chose Buyer or Both Buyer and Seller on the last step, you will see one more screen for **Accounts Payable POC**. Please refer to POC data above for details. The only difference is that for these two POCs, you are encouraged to use general (office) name, email, and phone information (such as acctspay@myagency.gov).

The screenshot shows a web browser window titled "Federal Agency Registration - Microsoft Internet Explorer". The address bar shows a URL starting with "http://omcuser/FAR/". The main content area is titled "Accounts Payable Point of Contact" and contains the following text: "You have indicated that your office acts as a buyer in intragovernmental transactions. Please provide information about the point of contact for accounts payable and collection. This information may be generic A/R information for this office or entity. Click on the list below to choose a previously registered POC, and then click Continue." Below this text is a dropdown menu with "Nancy Brown" selected and a "Continue" button. There are also input fields for "Email", "First Name", "Middle", "Last Name", "Phone Number", "Fax", and "Position". The left sidebar contains links for "Home", "Dun and Bradstreet", "Intragovernmental Transaction Portal (IGTP)", "Business Partner Network (BPN)", and "Help". At the bottom of the sidebar are logos for "CCR", "SBA", "FedBizOpps", and "GSA". The taskbar at the bottom shows the Start button and various application icons.

Figure 11 – Buyer Information

Confirmation

That's it! Once you have filled in all required fields and clicked continue, you will be brought to your confirmation page. You may print this page for your records. You will receive a confirmation email as well. You may now return to the Record Access page to register another entity.

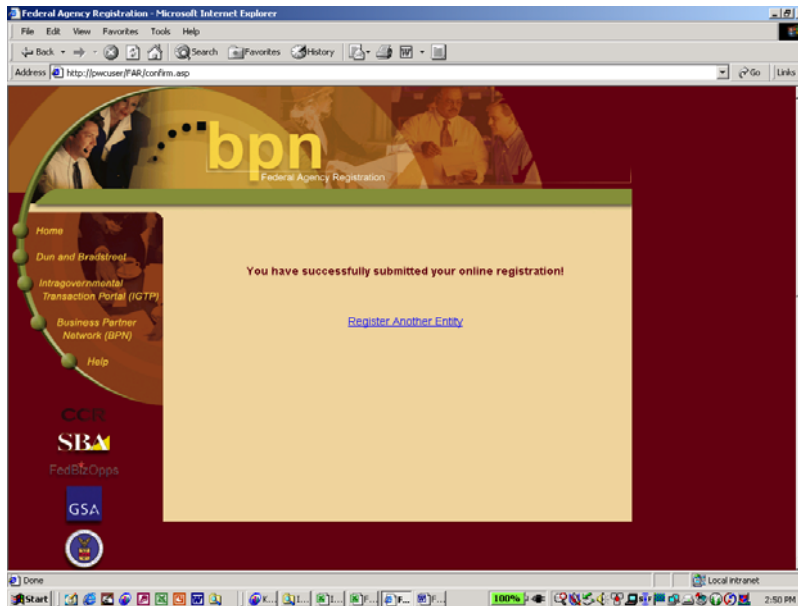


Figure 12 – Confirmation Screen

Creating a Bureau Record

Beginning at the Record Access page, choose the bureau you wish to complete. Click on the bureau name, and you will be taken to an “Entity Information” page with basic information about that agency. If you do not see any bureaus under your Bureau list, you do not have access. Please contact your ARO to obtain access.

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

Entity Information

The Entity Information page data is pre-filled for you from the Dun and Bradstreet database. Review this information. If it is incorrect, you will need to contact D&B to correct it. Please see the DUNS number section for information on how to do this. If it correct, click Continue to go on.

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

General Information

The next section requests general information about your bureau. Any fields with an asterisk (*) are required. You will see Help buttons next to each data element which will provide the following guidance:

EIN– Employer ID Number. This is a 9-digit number similar to a Taxpayer ID Number or Social Security Number. Your personnel office should have this information.

Department Code – This code identifies the agency that oversees this bureau. Categories correspond to the [Treasury Index of Agency Codes](#). In most cases, the Department Code will correspond to the agency for which the user works.

Agency Location Code (ALC) – This 8-digit code corresponds to the registering office and is usually associated in a one-to-one relationship with the DUNS. You may need to search our database for a list of possible ALC’s as they are listed in the Treasury IPAC system. You will receive a drop down list based on your agency, and you may choose one. You may also enter the ALC directly if you know it. If you do not know which code relates to this bureau, ask your finance office. If you have more than one ALC for this office, you may need to designate a DUNS + 4 extension (this should be a rare case. Please contact the system administrators for help using this function).

Disbursing Office Symbol – This two-digit symbol is used by the Treasury Department’s IPAC system and various other legacy systems to identify further financial information about your organization. It is generally linked to a particular ALC. In that case, the Disbursing Office Symbol will be automatically filled in for you. If we do not have a DO that links to your ALC, you will need to fill it in individually.

For more information on these data elements you may contact the BPN Help Desk (visit www.bpn.gov) for more information.

Once you have filled in this general information, click Continue to move on to Point of Contact Information.

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

General Points of Contact (POCs)

The first Point of Contact to fill in is the **Registration POC**. This should be an actual person who may be contacted with questions regarding the information in this record. Please note that filling in a person's POC information here does not give them access to the system, but it may be used by another agency when trying to resolve an intragovernmental transfer issue.

*n you enter
contact in
your office may be used by
other government agencies to
resolve intragovernmental
transfer issues. It will not be
available to the general
public and will be kept
secure. However, you should
ssified
is*

Registration POC using a previously registered person:

In many cases the appropriate person here will be you, the user! In other cases it will be someone who is already registered as a POC somewhere else in your agency. So to save you some time, we have created a way to fill in your data automatically. Click the arrow next to the drop down list at the top of the page to see if the individual you would like to use is listed here. If so, click their name to select, and then click Continue. You will be taken to a new page in which all of that user's information is filled out. You should go through and review that information, completing any required fields. Then click continue to move on.

Registration POC using a new person:

You may also fill in information for a POC who has not been previously registered. Just skip the drop down box and begin filling in that POC's information at the Email field. All fields with an asterisk (*) are required. You will fill in basic information about that person as follows:

POC Data

Email – Work email of the POC. This should be a unique and direct email.

Name – Name of the POC. First name and last name are required fields. Middle initial is optional.

Phone Number – 10 digits including area code and phone number, for example 2025551212. This should be a direct line to this individual.

Extension – If the phone number you give is not a direct line, please include the extension.

Fax – The number where you can receive faxes. 10 digits including area code and fax number.

Street Address 1 – Physical street address (not a PO Box) for your place of work

Street Address 2 – Additional address information such as Suite, Building, or PO Box numbers

City – City in which the place of work is located

Country – Country in which the place of work is located

State – US State in which the place of work is located. Only required if Country is USA.

Zip Code – Valid zip code. Please visit <http://www.usps.com/zip4/> for more information. Only required if Country is USA.

Zip + 4 – 4-digit zip code extension. Please visit <http://www.usps.com/zip4/> for more information.

Postal Code – This is only required if you choose a country other than USA.

Once you have completed all required fields, click Continue to go on.

The next POC to fill in is your **Eliminations POC**. This should be the person in your bureau to contact regarding intragovernmental eliminations. Again, please enter an actual person here, using the same data elements as above. You may choose a previously registered individual here as well. Once you have completed all required fields (and any others you wish to complete), click Continue to move on.

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

Business Type

The next screen will ask you what role your bureau plays in intragovernmental transactions. You should choose one of the three options in the drop down box: Buyer, Seller, or Both Buyer and Seller. Most agencies and offices within the federal government act as both at some point, thus most entities will choose Both Buyer and Seller. The next few sets of data you need to fill out depend on what you choose here. Some more details on this field:

Business Type – If your office buys from other federal government agencies, it is considered a Buyer here. A buyer is an entity that places an

order with another agency and has the authority to obligate funds for that purchase. If your office sells to government agencies, it is considered a Seller here. A seller is considered any office that receives and accepts orders from another agency (not necessarily the office that actually fills the order). Anyone who wishes to be visible in the government community as a seller of goods and services should also register here as a Seller. If your office ever does both, you should choose “Both Buyer and Seller” (most entities will fall under this category).

Seller Information

If you chose Seller or Both Buyer and Seller on the last step, you will next see a set of general seller information. All fields with an asterisk (*) are required.

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buyer Info

Annual Revenue – Total revenue from intragovernmental sales for the previous fiscal year. This should be for the particular office within the agency, not for the agency as a whole. This will be used for informational purposes only.

Credit Card – Indicate if your entity will accept government purchase card payments for intragovernmental sales. If yes, you must enter your Merchant ID.

Merchant ID Number 1 – Number assigned to you by the bank that processes your credit card receipts. Similar to a routing number.

Merchant ID Number 2 – If you work with two different banks to process credit card receipts you may have two merchant ID’s. If so, enter the second bank’s Merchant ID here.

Federal Supply Class – This is a four-digit code which describes the products or services your office sells. You may enter up to 20 codes in this field by placing a comma (,) but no spaces in between each code (for example 1234,3456,7865).

NAICS – North American Industrial Classification System. This six-digit code replaces the formerly used SIC codes to indicate the products or services your office sells. For a listing of codes and more information on NAICS, you may visit the [Census Bureau NAICS site](#). You may enter up to 20 codes in this field by placing a comma (,) but no spaces in between each code (for example 123456,345678,786543).

You will also need to fill information for two more **POCs, Sales and Accounts Receivable**. Please refer to POC data above for details. The only difference is that for these two POCs, you are encouraged to use general (office) name, email, and phone information (such as sales@myagency.gov).

Entity Info	
General Info	
General POCs	
Business Type	
Seller Info	Buy Info

Buyer information

If you chose Buyer or Both Buyer and Seller on the last step, you will see one more screen for **Accounts Payable POC**. Please refer to POC data above for details. The only difference is that for these two POCs, you are encouraged to use general (office) name, email, and phone information (such as acctspay@myagency.gov).

Confirmation

That's it! Once you have filled in all required fields and clicked continue, you will be brought to your confirmation page. You may print this page for your records. You will receive a confirmation email as well. You may now return to the Record Access page to register another entity.

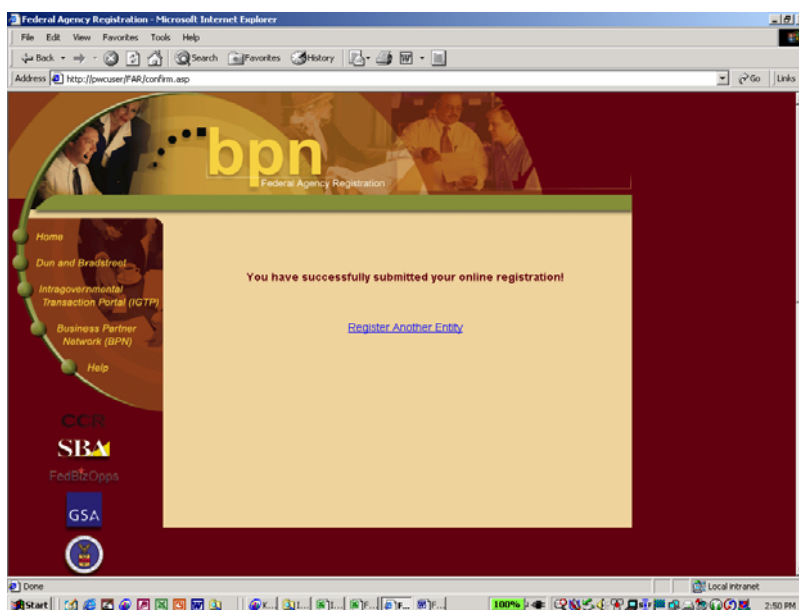


Figure 13 – Confirmation Screen

Creating an Office Record

Please note: The office registration function of this system is still in development. Beginning at the Record Access page, choose “Create a New Office” link found at the bottom of your screen. You will be taken to the New Office Page:



Figure 14 – New Office Page

First, click the drop down box arrow to choose the Bureau to which this office should be assigned. Remember, there is no hierarchy on this system below the bureau level.

Then, enter the DUNS number for this office. You should have the DUNS number for each office you wish to register on your D&B DUNS tree (for more information on this please refer to the DUNS Number section at the beginning). Enter it here, and then enter the name you wish to use for this office. Click continue.

On the next screen you will be given the option to continue working on this office record yourself, or to delegate access to another individual. Assuming you want to continue to create this record, click Continue and you will be taken to a page asking for general information on that office.

General Information

The next section requests general information about your office. Any fields with an asterisk (*) are required.

Please provide the following information about your entity and then click Continue. Fields with an asterisk (*) are required.

*Employer Identification Number

Department Code

Agency Location Code
Please enter your agency location code or select from the list below

Disbursing Office
Please enter your disbursing office or select from the list below

Continue Reset

Agency Location Code

Department Code

Figure 15 – General Information

You will see Help buttons next to each data element which will provide the following guidance:

EIN– Employer ID Number. This is a 9-digit number similar to a Taxpayer ID Number or Social Security Number. Your personnel office should have this information.

Department Code – This code identifies the agency that oversees this office. Categories correspond to the [Treasury Index of Agency Codes](#). In most cases, the Department Code will correspond to the agency for which the user works.

Agency Location Code (ALC) – This 8-digit code corresponds to the registering office and is usually associated in a one-to-one relationship with the DUNS. You may need to search our database for a list of possible ALC's as they are listed in the Treasury IPAC system. You will receive a drop down list based on your agency, and you may choose one. You may also enter the ALC directly if you know it. If you do not know which code relates to this bureau, ask your finance office. If you have more than one ALC for this office, you probably need to register the subordinate offices. If subordinate offices don't exist, you may need to designate a DUNS + 4 extension (this should be a rare case. Please contact the system administrators for help using this function).

Disbursing Office Symbol – This two-digit symbol is used by the Treasury Department's IPAC system and various other legacy systems to identify further financial information about your office. It is generally linked to a particular ALC. In that case, the Disbursing Office Symbol

will be automatically filled in for you. If we do not have a DO that links to your ALC, you will need to fill it in individually.

For more information on these data elements you may contact the Help Desk.

Once you have filled in this general information, click Continue to move on to Point of Contact Information.

General Points of Contact (POCs)

The first Point of Contact to fill in is the **Registration POC**. This should be an actual person who may be contacted with questions regarding the information in this record. Please note that filling in a person's POC information here does not give them access to the system, but it may be used by another agency when trying to resolve an intragovernmental transfer issue.

The information you enter about points of contact in your office may be used by other government agencies to resolve intragovernmental transfer issues. It will not be available to the general public and will be kept secure. However, you should not enter any classified database.

Registration POC using a previously registered person:

In many cases the appropriate person here will be you, the user! In other cases it will be someone who is already registered as a POC somewhere else in your agency. So to save you some time, we have created a way to fill in your data automatically. Click the arrow next to the drop down list at the top of the page to see if the individual you would like to use is listed here. If so, click their name to select, and then click Continue. You will be taken to a new page in which all of that user's information is filled out. You should go through and review that information, completing any required fields. Then click continue to move on.

Registration POC using a new person:

You may also fill in information for a POC who has not been previously registered. Just skip the drop down box and begin filling in that POC's information at the Email field. All fields with an asterisk (*) are required. You will fill in basic information about that person as follows:

POC Data

Email – Work email of the POC. This should be a unique and direct email.

Name – Name of the POC. First name and last name are required fields. Middle initial is optional.

Phone Number – 10 digits including area code and phone number, for example 2025551212. This should be a direct line to this individual.

Extension – If the phone number you give is not a direct line, please include the extension.

Fax – The number where you can receive faxes. 10 digits including area code and fax number.

Street Address 1 – Physical street address (not a PO Box) for your place of work

Street Address 2 – Additional address information such as Suite, Building, or PO Box numbers

City – City in which the place of work is located

Country – Country in which the place of work is located

State – US State in which the place of work is located. Only required if Country is USA.

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Once you have completed all required fields, click Continue to go on.

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Business Type

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NAICS – North American Industrial Classification System. This six-digit code replaces the formerly used SIC codes to indicate the products or services your office sells. For a listing of codes and more information on NAICS, you may visit the [Census Bureau NAICS site](#). You may enter up to 20 codes in this field by placing a comma (,) but no spaces in between each code (for example 123456,345678,786543).

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these two POCs, you are encouraged to use general (office) name, email, and phone information (such as sales@myagency.gov).

Buyer information

If you chose Buyer or Both Buyer and Seller on the last step, you will see one more screen for **Accounts Payable POC**. Please refer to POC data above for details. The only difference is that for these two POCs, you are encouraged to use general (office) name, email, and phone information (such as acctspay@myagency.gov).

Confirmation

That's it! Once you have filled in all required fields and clicked continue, you will be brought to your confirmation page. You may print this page for your records. You will receive a confirmation email as well. You may now return to the Record Access page to register another entity.

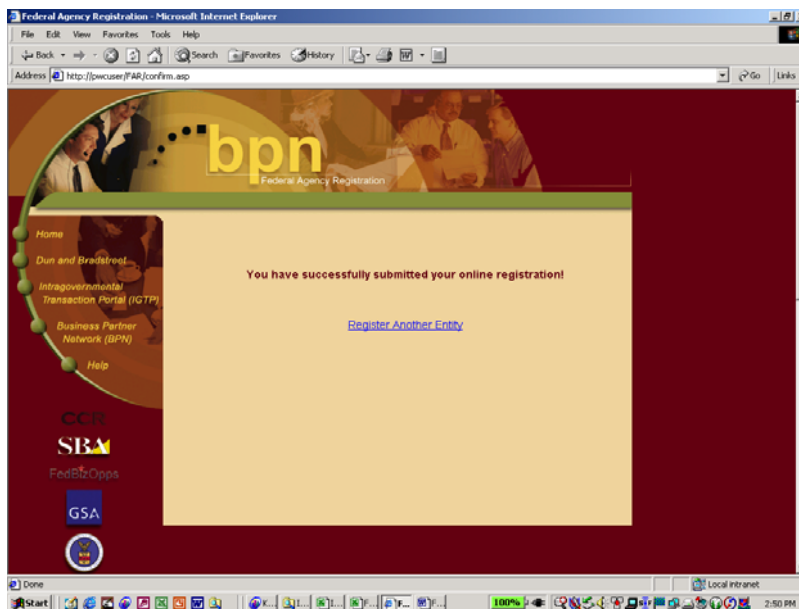


Figure 16 – Confirmation Screen

RECORD MAINTENANCE

Delegating Access

AROs have the ability to delegate access to records within their own agency. The individual you wish to receive the access will need to visit the site and request it (see the Requesting Access section). To begin delegation, the ARO should visit his or her Record Access page and choose the Access Delegation link found at the bottom of the page. Click this link, and you will be taken to a page that looks similar to your record access page (see Figure 17).

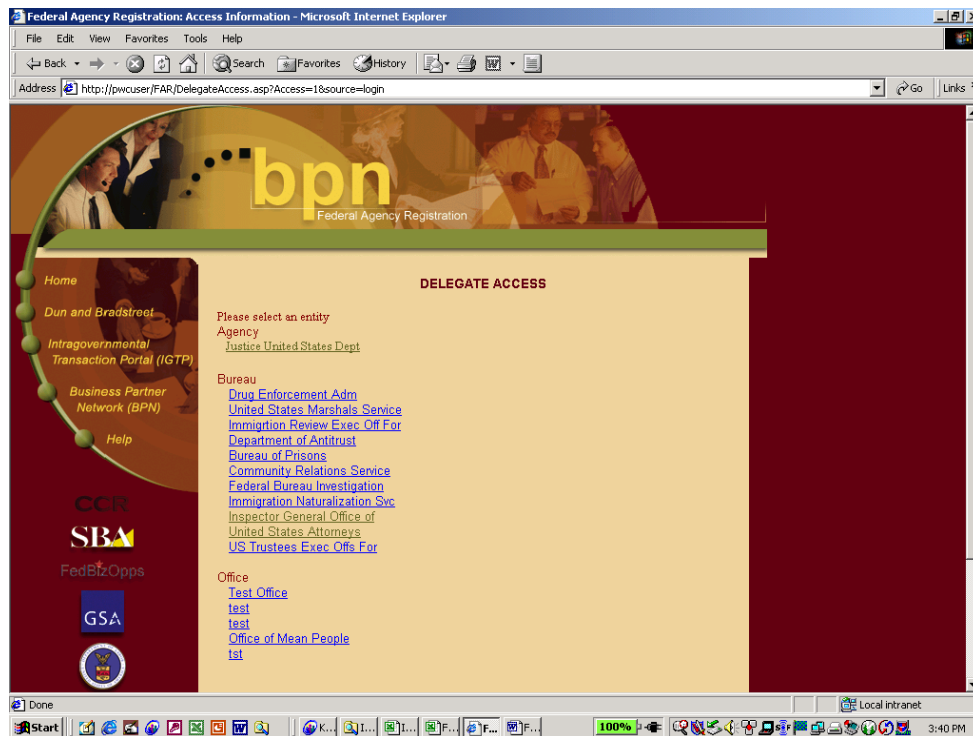


Figure 17 – Access Delegation

Choose the agency, bureau, or office you wish to delegate by clicking that link. You will see a new screen with a drop down list of potential designees. If someone has not requested access, they will not appear on this list (Figure 18).

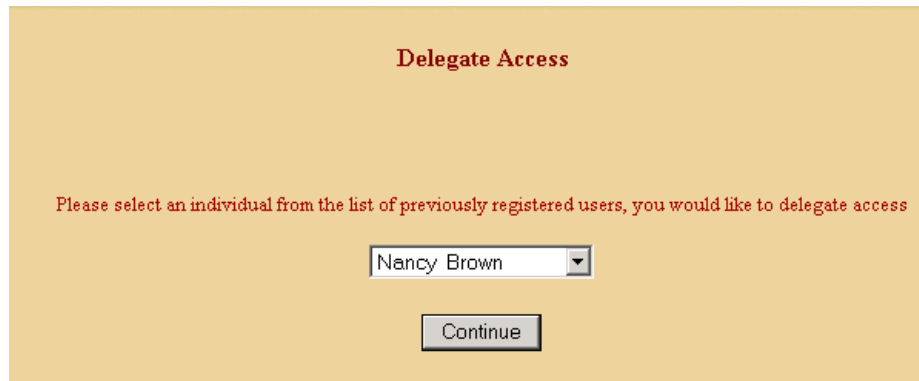


Figure 18 – Delegate Access List

Choose the person to whom you wish to grant access, and click Continue. You will receive a confirmation notice on the screen, and the person to whom you granted access will receive an email notifying them of the change. The next time they log on to the site, they will see the new entity on their Record Access page, and will have full access to that entity.

Saving Your Record

If you log out while in the middle of the record, the system will save the partially completed record as an actual record. You may access that record at any time to complete it. Version 2.0 will have an access list to manage partially completed records.

Updating Your Record

Records must be updated at a minimum **once each year**. Any user with access to that record may update the record at any time. Just log on using your ID and Password, and click the appropriate Agency or Bureau from the Record Access list (for Offices, you should click the Bureau for that office and you will then have access for these offices) to enter the record. You will see all previously entered information. Just click through until you reach the data to update, make the changes, and then click through to the end. Your changes will be saved over the old record.

The FedReg system tracks all changes to a record, including who made it. So you will be able to see who changed the record last. However, the system will not keep old data. Once you have changed the record, the old data is lost and the new saved in its place. Version 2.0 will include an audit trail, and will track which user made a change.

Changing Your Password

You may change your password at any time. Log on to the system using your old password to get to the Record Access Screen. Once there, click the link at the bottom of the page entitled: Change Password. This will bring you to the screen pictured here:


A screenshot of a web form titled "Change Password" in a bold, dark red font. The form has a light tan background. It contains two text input fields. The first field is preceded by the label "Please choose a password" in a small, dark red font. A small icon of a hand pointing to the right is positioned to the right of this field. The second field is preceded by the label "Retype Password" in a small, dark red font. Below the input fields is a single button labeled "Continue" in a grey box with a thin border. The entire form is framed by a thin green border at the top and a thin dark red border at the bottom.

Figure 19 – Change Password

Enter your new password in the top field, enter it again in the second field for verification, and then click “Continue” to set this as your new password.

APPENDICES

OMB Memoranda
IAE Bulletins
Data Elements Dictionary
Frequently Asked Questions